

Impactful Proposal Graphic Design

When used effectively, graphics increase your proposal’s clarity and persuasive power. And also your win rate.

Nick Kolenda, author of *Methods of Persuasion: How to Use Psychology to Influence Human Behavior*, stated, “Reality is objective, but our perception of reality is subjective.” You can help your reviewer improve both with clear, compelling, professional graphics. By leveraging them, you enable decision-makers to review your solution intellectually and emotionally—vital components in decision making.

To make the most of your proposal graphics, it is important to understand these key concepts:

1. How do proposal graphics increase win rates?
2. What motivates your audience?
3. How do design and designers fit into the proposal process?
4. When and how should you create graphics? How do you evaluate them?
5. What are the types of proposal graphics?
6. What design principles and techniques should you know?
7. What are industry best practices for creating impactful graphics?
8. What tools and emerging technology can help you create graphics?
9. When and where should you bend design principles?

1.0 Proposal graphics increase win rates

Clear, compelling, audience-focused graphics (including covers) improve win rates. They convey information to the audience in a more compelling and easily digestible manner, and they help reach readers both intellectually and emotionally. They can also communicate faster and improve reader recall.

A 3M-sponsored study at the University of Minnesota School of Management found that presentations that use visual aids are 43 percent more persuasive than those that do not.

Visuals also improve reader recall and foster an accurate understanding of the material you’re presenting. Figure 1-1 shows an example of this. Which approach makes it easier to understand what a circle is?

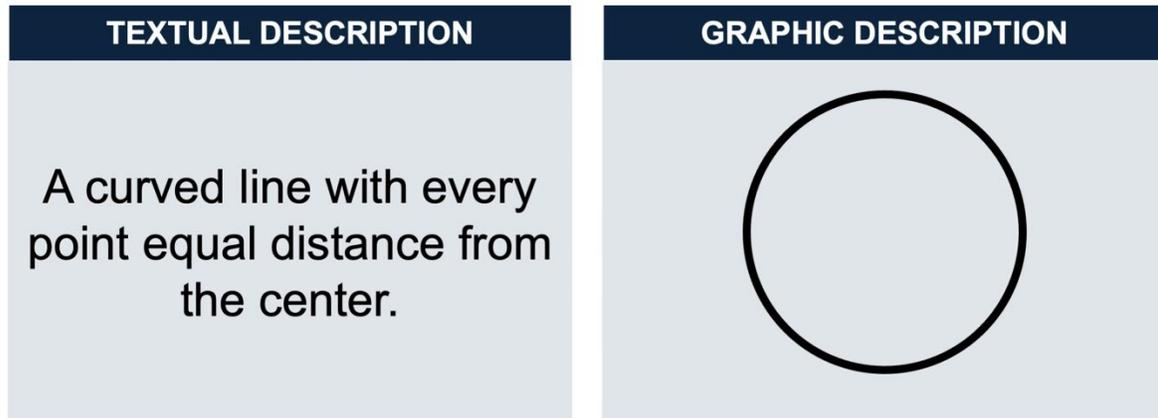


Figure 1-1. Graphics vs. Text. *Graphics are often more understandable and improve recollection.*

Effective graphics demonstrate professionalism and proficiency faster than words alone, grab attention, and influence a reader’s decisions. Consider the example in Figure 1-2, which shows the same story told both textually and visually. Do you notice any differences in how the two presentations engage you? Help you comprehend the story? Make you feel?

Graphics, when done correctly, make it easier to review your proposal. They highlight the most important and impactful parts of your solution. Visuals can quickly differentiate your offering, communicate the quality of your response and solution, and set the tone for your proposal.

Infographics like the one in Figure 1-2 can influence the mechanisms of rational thinking. They can also create important emotional responses, like a sense of trust.

DDS's Custom Tiered Help Desk Support Model

New Tech is committed to trouble shooting and solving user IT issues through our Help Desk that is customized to DDS's needs. Historically, our Help Desk can resolve 99.9% of trouble tickets within 6.2 hours of the ticket's creation. Our innovative Help Desk support model is made up of 3 escalating tiers; Tier 1 – Automated Support, Tier 2 – Virtual Support, and Tier 3 – In-Person Support.

Tier 1 is the ultimate user-friendly DIY troubleshooter. Through our easy-to-use Help Desk portal, users can select our innovative IT Support platform to diagnose, reset, repair, and restart their systems simply by using a few key words. Anything a user may need to troubleshoot the most common issues themselves can be found under IT Support. If the user goes through the suggested steps and does not immediately fix their issue, the ticket is automatically escalated to Tier 2.

Tier 2 is made up of our virtual IT technicians ready to support users 24 hours a day 7 days a week for technical issues that are a bit more complex than Tier 1 can handle. With a minimum of 2 years of experience, our technicians are trained and ready to verbally walk the user through fixing the issue or if more hands-on help is needed, our technicians can remotely log in to the user's system to fix the issue. Our virtual technicians stay online with the user until they are sure the issue is fixed. If the ticket is not resolved within 2 hours of working with the virtual technician or it is apparent sooner that an in-person visit is needed, the technician will escalate the ticket to Tier 3.

Tier 3 is made up of our most experienced certified IT technicians ready to support in person for the most complex issues. Our typical in person response time is 4 hours or less and available every Monday—Saturday 8 am-6 pm. With equipment prepared in advance, our in-person technicians are authorized to repair or replace all software and hardware as needed on site at the time of visit.

Our Help Desk Portal is the ultimate Help Desk tool for users and technicians. Not only is Tier 1 accessed through the portal, but technicians can also securely access and manage end user permission, check inventory, procure assets and coordinate Tier 2 and 3 escalation. Real-time feedback, reports, and metrics for New Tech program managers and DDS ensuring quality and continuous improvement of the Help Desk. All access to the portal is secure and customizable based on defined access levels and need.

In short, our innovative IT Help Desk is ready to support the user with our customized easy-to-use portal, DIY Tier 1 – automated support, Tier 2 – virtual support technicians ready to solve the more complex issues anytime day or night, and for the most complex issues, our Tier 3 – In-Person support technicians are ready to solve any IT issue in on site. User issue resolution is guaranteed.

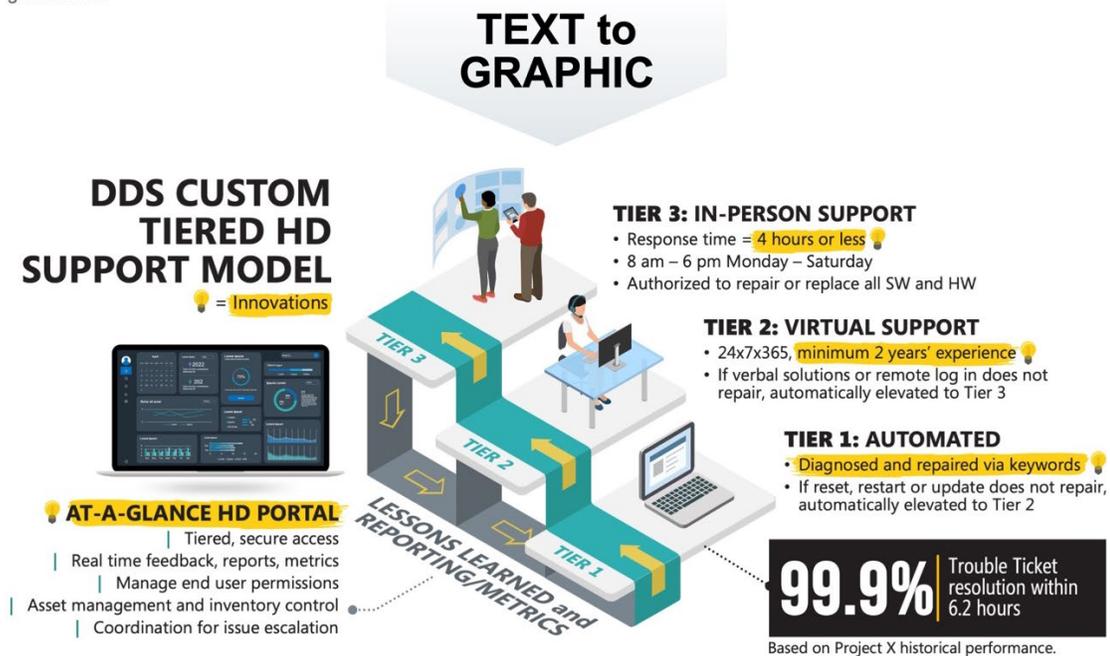


Figure 1-2. Text to Graphic.

This image shows a text-only description compared with a graphic depiction that includes edited text from the narrative.

Remember, however, that graphics are not necessarily better than text. Mike Parkinson explains in *Billion Dollar Graphics* that “the combination of graphics and words has a communicative power that neither singularly possess. Without graphics, an idea may be lost in a sea of words. Without words, a graphic may be lost to ambiguity.”

Similarly, researcher J.R. Levin points out, “Pictures interact with text to produce levels of comprehension and memory that can exceed what is produced by text alone.”

2.0 Graphics should reflect your customer’s motivations

To create persuasive content and a powerful message, you must know what motivates your audience. In fact, proposal graphics that fail do so because they are created by the author **for** the author—even though the author does not decide who wins. Uncover what motivates your evaluator, decision-maker, or reviewer to demonstrate understanding and resonate with what is important to them. By knowing your audience’s specific needs, goals, and pain points, you will be able to align your solution with customer needs, highlight discriminators, and better visualize persuasive proposal graphics. Figure 2-1 shows common benefits clients desire.

BENEFITS BUYERS DESIRE	
Maintain (Keep)	Relieve (Get rid of)
Acquire (Get)	Protect (Avoid)

Figure 2-1. Client Motivations.

In general, clients typically seek four types of benefits, depending on their perception of what is good, is bad, and should be in their possession.

Clients want a solution that meets their specific needs and answers their concerns. Their perceived value of your solution must outweigh any constraints or lingering concerns they may have. Winning solutions create perceived value across balanced scope, schedule, resource (including cost), and quality considerations (Figure 2-2).

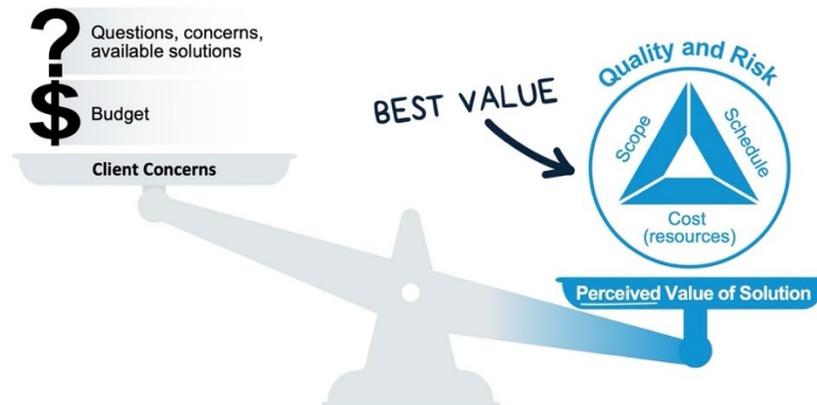


Figure 2-2. Best Value. *If a solution is seen as better than other options, it is perceived to be the best value.*

Your understanding of the customer should influence your graphic’s messaging, content, and aesthetics. Use this understanding to create winning visuals. For example, if a customer is feeling financial pressure, they may not favor submissions that look (aesthetically) expensive. The designer might adjust the style to avoid a bias against overpriced proposed solutions.

3.0 How design and designers fit into the proposal process

The entire proposal lifecycle benefits from creativity and visuals. Where the designer fits in the process depends on their team’s maturity level, needs, and expectations.

Proposal environments range in their maturity level, from less to more mature.

Mature organizations have defined processes (e.g., conceptualization, rendering, tracking, editing), have clear roles and responsibilities, have access to trained designers, use higher-end graphic design tools, and have graphic asset libraries. Graphics are often made early in the process, sometimes before narrative is written. Mature organizations track graphic development time and know the level of effort required to conceptualize, render, and edit graphics. This information allows proposal managers to effectively schedule graphic support, speed up production, and lower development costs.

Figure 3-1 summarizes types of graphic support used during a more mature business development (BD) process.

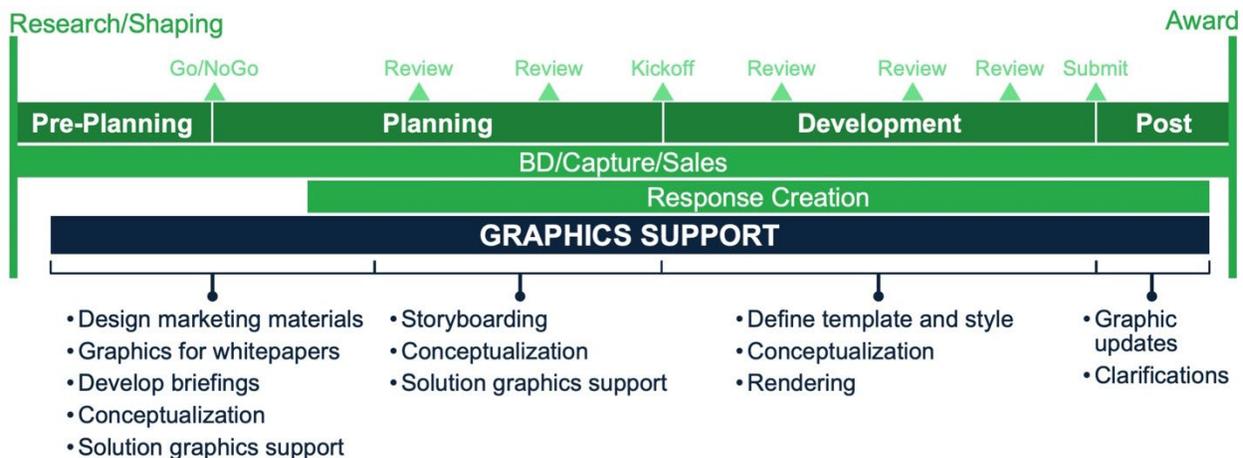


Figure 3-1. Sample Business Development (BD) Lifecycle. *Graphics support the entire BD lifecycle.*

Less mature organizations create graphics using an ad hoc approach, with whatever tools and people are available. Often, graphics are created by the authors themselves. Sometimes, graphics also lack defined messages. Older proposal graphics are reused due to resource constraints rather than because they align with the current opportunity’s win themes, customer needs, or defined messages. Graphics are often made late in the process and not early. Visuals may be found on the web and illegally reused without the original author’s consent. In the least mature teams, graphics are aesthetically unappealing, inconsistent, and unprofessional.

3.1 Roles and responsibilities

There are two primary graphic design roles in a proposal team: someone who conceptualizes graphics and someone who renders them. These roles work cooperatively and can be done by the same person or different people, depending on the organization’s process, size of the response, and an individual’s skillsets.

Figure 4.1-2 illustrates key deliverables in the conceptualization (steps 1 and 2) and rendering (step 3) process.

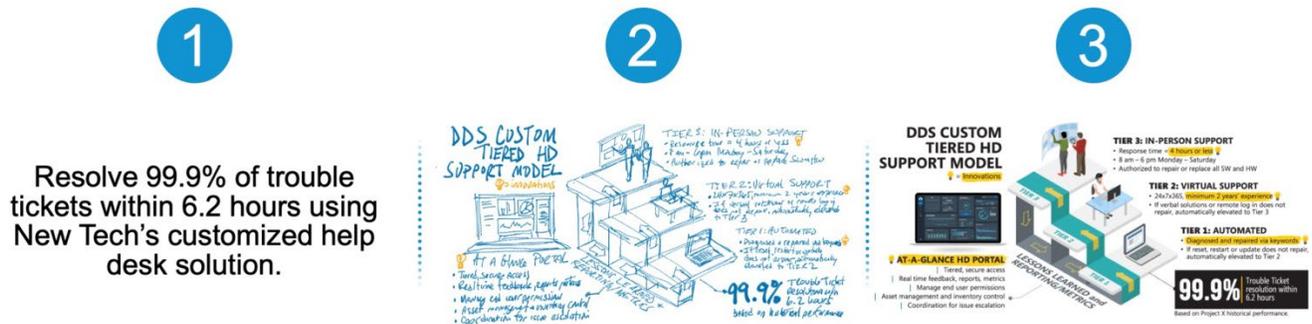


Figure 4.1-3. Key Deliverables. When conceptualizing and rendering a graphic, begin with a summary (action caption), create a mock design, then finalize it.

3.1.1 Conceptualizer’s role

The graphic conceptualizer turns words, data, and ideas into clear, compelling sketches or mock-ups. The conceptualizer(s) ideally works across all sections to help align messaging and concepts.

Concepting is usually done in two ways, by using the 1) Material Based method and/or 2) Team Based method.

Method 1: Material Based

The conceptualizer reviews the latest version of any relevant material starting ideally as early in the process as possible. The written materials may include DRFP/RFP/RFI/RFQ, websites, white papers, briefings, videos, and the proposal itself if it has already been written. (It is recommended to write the proposal narrative *after* the graphic concepts are developed.) The conceptualizer may use this as an opportunity to identify content that would benefit from graphics and start to conceive what the concepts may be. The basic steps of this process include:

1. Gather insights from related materials and, if already complete, the written response.
2. Read material relevant to the response, especially evaluation criteria, if any.
3. Highlight areas in the response that look like they should have a graphic. Key opportunities to look for include items that read as a process, text that mentions a solution to a problem, or an important methodology.
4. If needed, meet with the section owner and/or team to review findings and get additional information such as benefits and discriminators.
5. Create a summary of the graphic. The summary is the message of the graphic. It should include a brief, one-sentence description of the benefits it’s intended to communicate, associated features, and relevant discriminators or proof points. A version of the summary will be used as the graphic’s action caption (for written proposals) or title (for an oral proposal).
6. Share sketches or mock-ups with the author and other stakeholders.
7. Iterate until the sketch is approved for rendering (see rendering steps).

8. Explain the sketch’s concepts to the renderer (unless the person who conceptualized it will also render the graphic). This helps ensure compliance and aesthetic alignment.
9. Review the graphic after rendering, if needed request revisions.
10. Submit the draft graphic for review.

Method 2: Team Based

When a team identifies a need for a graphic, the Conceptualizer works with the team (usually Subject Matter Experts) to develop the graphic based on a clearly defined objective.

The basic steps of this process include:

1. Hold a concept meeting with the author/SME to:
 - o Identify the objective and target audience of the graphic. What should the graphic communicate? Does it respond to certain evaluation criteria? Where is it located in the response?
 - o Develop a summary of the graphic. Create a summary of the graphic. The summary is the message of the graphic. It should include a brief, one-sentence description of the benefits it’s intended to communicate, associated features, and relevant discriminators or proof points. A version of the summary will be used as the graphic’s action caption (for written proposals) or title (for an orals proposal).
 - o Gather supporting information to explain the summary. What is the feature and how/where does it offer benefits to the customer? Sometimes this information is sent after the meeting if the team needs time to do additional research.
2. Create a graphic sketch or mock-up showing the key information and benefits.
3. Share sketches or mock-ups with the author/SME.
4. Iterate until the sketch is approved for rendering (see rendering steps).
5. Explain the sketch’s concept to the renderer (unless the person who conceptualized it will also render the graphic). This helps ensure compliance and aesthetic alignment.
6. Review the graphic after rendering, if needed request revisions.
7. Submit the draft graphic for review.

3.1.2 Renderer’s role

A renderer illustrates professional, compliant graphics. Using design principles and tools, they create graphics from the sketches or mock-ups the conceptualizer (e.g., a conceptual designer, author, SME) made. A renderer is focused on aesthetics, compliance, and visual consistency across graphics in the same response. This role is usually filled by one or more graphic designers with proposal experience.

The basic steps of the rendering process include:

1. Review the submitted sketch or mock-up.
2. Ask the conceptualizer clarifying questions.

3. Ensure the graphic is logged with an identifier related to the response.
4. Make or use an approved template to create the proposal-ready graphic using the sketch and summary.
5. Work with the conceptualizer to ensure that the graphic aligns with the summary, especially after large revisions to the graphic.
6. Make adjustments to realign the graphic to the summary.
7. Perform a quality check (QC) to identify any errors. Be sure to look for spelling and style consistency. Ideally, the renderer should find someone else to perform the QC check.
8. Make adjustments based on the QC.
9. Submit the completed graphic for review and insertion into the document.
10. Repeat steps as necessary before and after gate reviews.

To avoid unnecessary revisions, the designer needs to know when and how to create the graphics and objectively review and iterate them.

4.0 When and how to create graphics and then objectively evaluate them

Proposal graphics are vital in three situations:

When your topic is complex: Graphics like diagrams, charts, and visuals communicate intricacies more clearly than text alone. Network diagrams, quantitative charts, dashboard graphics, Gantt charts, organizational charts, and process diagrams can all help you convey your message clearly, and often in less page space.

When your information is critical to success: If key points are misunderstood or overlooked, your proposal may seem deficient. Clear, compelling graphics increase favorable reviews.

When you want to influence emotions: High-quality graphics positively impact the perceived quality of your solution. They build needed trust.

Even the U.S. federal government sees the value in a well-designed proposal, as they demonstrated with the following requirement, found in a request for proposal (RFP): *“Offerors are cautioned that the Government considers the overall form and substance of their proposal to represent the general quality of work expected to be performed under this contract. Accordingly, it will be considered throughout the review and scoring/evaluation process.”*

Create your messaging and concepts early, before you write the proposal. While this may seem counterintuitive, doing so provides a shared vision and messaging up front. It can also reveal gaps that need to be addressed early. You can also use conceptualized/draft graphics and their titles/action captions as a storyboarding tool, helping you write and define your proposal content.

Once you’ve chosen which messages can become graphics, follow these four steps:

1. **Summarize:** Summarize your graphic in one sentence. This becomes the title (for an orals proposal) or action caption (for a written proposal) and can help you define what you want to say before you draft the graphic. Keep this message as succinct as possible to improve understanding and recall. The conceptualizer, author, or SME does this.
2. **Explain:** Provide details that support your one-sentence summary.
3. **Visualize:** Turn the summary and explanation into a visual concept.
4. **Render:** Turn the concept into a professional, compliant graphic.

1. Summarize: Create your graphic’s message.

Your graphic should have a title (for an orals proposal) or action caption (for a written proposal) that summarizes the key message in one sentence. The title or action caption guides a graphic’s content.

Follow these tips to create a strong, persuasive action caption and graphic:

- To influence, motivate, or persuade your audience, include a benefit (or another motivator) and how it’s achieved (or avoided).
- Succinct, customer-focused captions communicate most effectively and result in better graphics. To paraphrase Einstein, those who cannot explain simply do not fully understand. When writing, make sure your message aligns with the proficiency level of every possible reviewer.
- Avoid listing more than three benefits, which could dilute or complicate your message.
- Imply obvious benefits rather than stating them outright. For example, no need to list “risk mitigation” on a process about mitigating risk.
- When applicable, include proof and discriminators in the caption. Figure 4.1-1 is an example of a benefit-driven action caption with quantitative evidence.
- Never conceptualize or render a graphic before the one-sentence summary is written.

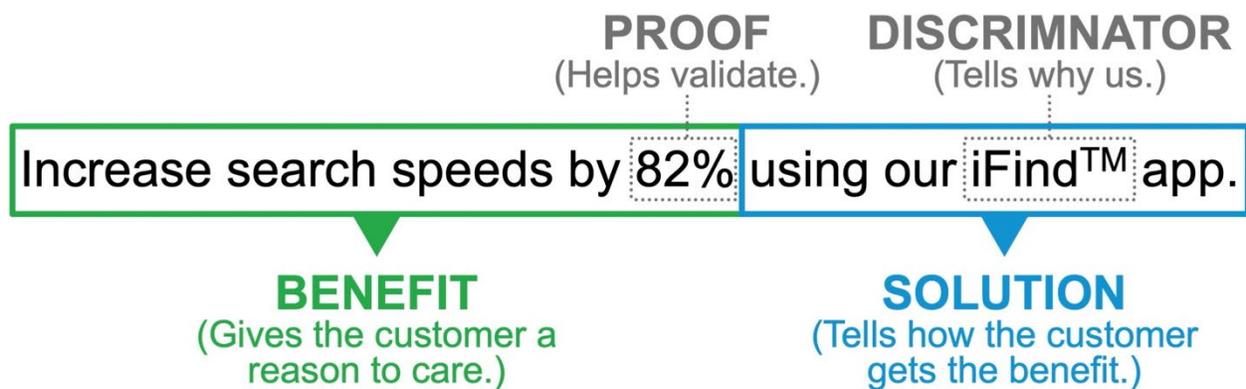


Figure 4.1-1. Graphic Summary. A customer-focused, benefit-driven summary improves the persuasive power of your graphic and proposal; the summary becomes the title or action caption.

Include an action caption with every graphic. Action captions textually summarize the graphic’s meaning. They are composed of two or three parts:

1. Figure number
2. Informative heading (optional)
3. A complete sentence explaining the relevance of the graphic to the evaluator, linking benefits to solutions or features of a solution

2. Explain: Provide the details that prove the summary.

Developing a concept of your graphic often involves input from SMEs and/or research. Your explanation should help answer the following questions:

- a. What message is the graphic trying to convey?
- b. Does any part of the content shown in the graphic differentiate your solution over what others will propose?
- c. Does the graphic give the audience a reason to care?
- d. Are there proof points or evidence?
- e. If the graphic involves data, are there metrics for the information shown? If yes, what are they?
- f. How much space can this graphic use?
- g. Where will this graphic be used in the proposal document and other deliverables?

3. Visualize: Turn the summary and explanation into a visual concept.

Using the summary and explanation, create a graphic concept sketch or mock-up showing the key information and benefits using whatever tool is easiest for you (pen and paper, PowerPoint, etc.). Aesthetics are not important at this point. This step is all about capturing the information visually in a succinct manner that can enhance the reviewers understanding of key features, benefits, and discriminators.

The conceptual mock-up is then reviewed (and iterated when needed) before its rendered to avoid aesthetic biases influencing feedback on the message, content, and concept.

Established organizations follow a systematic process to select the most suitable graphic type. A case in point is XYZ Company, which employs a matrixed approach to rapidly sift through potential graphic types. XYZ Company chooses a graphic type, conceptualizes graphic options through sketches or mock-ups, and once approved, proceeds to the last step, render the graphic. Figure 4.1-2 shows a graphic cheat sheet to assist in choosing appropriate graphic types.

4. Render: Turn the concept into a professional, compliant graphic.

Once the concept is approved, professionally render a compliant graphic. Use the rendering tool (like Adobe Illustrator or PowerPoint) and style (defined and approved before rendering) most appropriate for the type of response submission.

Each aesthetic choice should be purposeful. Consider the following two examples:

- Are you building brand awareness? If yes, then use your organization's brand standards to grow mindshare.
- What is your audience's age demographic? Older demographics tend to associate photorealism with higher quality, while younger audiences often associate simplified design with higher quality.

By combining your organizational goals with the expectations of your audience, you can make more effective aesthetic choices.

GRAPHIC CHEAT SHEET

	Simple <i>The information to be communicated is easy to understand and is focused.</i>	Complex <i>The information to be communicated is intricate or subjective.</i>	Quantitative <i>The information to be communicated is numeric.</i>
Hierarchy	[Icons: tree diagram, pyramid, funnel, etc.]	[Icons: complex tree, network, etc.]	[Icons: bar chart, line chart, etc.]
Architecture or Structure	[Icons: floor plan, organizational chart, etc.]	[Icons: complex network, etc.]	[Icons: bar chart, line chart, etc.]
Process or Flow	[Icons: flowchart, process diagram, etc.]	[Icons: complex process, etc.]	[Icons: bar chart, line chart, etc.]
Cause and Effect	[Icons: fishbone, flowchart, etc.]	[Icons: complex process, etc.]	[Icons: bar chart, line chart, etc.]
Comparison <i>(Another option is to show two of the same graphic type and highlight the similarities or differences between both.)</i>	[Icons: side-by-side comparison, etc.]	[Icons: complex comparison, etc.]	[Icons: bar chart, line chart, etc.]
Synergy	[Icons: Venn diagram, etc.]	[Icons: complex synergy, etc.]	[Icons: bar chart, line chart, etc.]
Relationship <i>(Most graphic types can show relationships between elements. The graphic types pictured here are those most often used.)</i>	[Icons: Venn diagram, etc.]	[Icons: complex relationship, etc.]	[Icons: bar chart, line chart, etc.]
Transition	[Icons: flowchart, etc.]	[Icons: complex transition, etc.]	[Icons: bar chart, line chart, etc.]
Amount or Value <i>(Most graphic types can accommodate amounts and values. The graphic types pictured here are those most often used.)</i>	[Icons: bar chart, line chart, etc.]	[Icons: complex amount, etc.]	[Icons: bar chart, line chart, etc.]
Time <i>(Most graphic types can show time. The graphic types pictured here are those most often used.)</i>	[Icons: timeline, etc.]	[Icons: complex time, etc.]	[Icons: bar chart, line chart, etc.]
Physical Description	[Icons: photograph, etc.]	[Icons: complex description, etc.]	[Icons: bar chart, line chart, etc.]
Location or Distance	[Icons: map, etc.]	[Icons: complex location, etc.]	[Icons: bar chart, line chart, etc.]
Protection or Isolation	[Icons: Venn diagram, etc.]	[Icons: complex protection, etc.]	[Icons: bar chart, line chart, etc.]

Graphic Types...

- area chart, dashboard graphic, map graphic, scale graphic
- background, dna graphic, network diagram, spiral graphic
- bar chart, dome graphic, org. chart, stacked graphic
- before & after graphic, ribbons diagram, peg graphic, stair graphic
- bridge graphic, floor plan, photograph, step-by-step graphic
- bubble chart, funnel graphic, pie chart, table
- building block graphic, goat chart, pipe graphic, tear sheet
- calendar, gauge graphic, point chart, template
- condemned chart, gear graphic, PowerPoint template, template graphic
- chain graphic, hexagon graphic, process diagram, timeline
- circle chart, hub and spoke graphic, puzzle graphic, tree diagram
- collage, icons & symbols, pyramid graphic, ves diagram
- conveyor belt graphic, illustration, radar chart, venn diagram
- cross section diagram, line chart, risk matrix, waterfall diagram
- cutaway diagram, looping graphic, road graphic, zipper graphic

HOW TO USE...

- STEP 1: Pick a row (concept).**
At its core every graphic is communicating one of the concepts in the left column.
- STEP 2: Pick a column.** Choose the appropriate level of complexity or type of information from the three columns that align with your content.
- STEP 3: Pick a graphic type.** Choose a graphic type that aligns with your subject matter and tells the story you want to tell.

Compliments of 24 Hour Company (www.24hrco.com).

Figure 4.1-2. Graphic Cheat

The Graphic Cheat Sheet helps choose a graphic type based on the message.

4.2 Objectively validate your graphics

Seek validation at every step in the graphic development process and at every milestone. For instance, when a title or action caption has been composed, determine whether it aligns with the RFP’s stipulations and is oriented toward the customer. After formulating a conceptual design, verify that it unambiguously delivers the desired message prior to the rendering process.

When assessing the success of your graphic, ask these questions:

Goal: Does this graphic meet the requirements of the response? Does it answer a crucial customer question, provide information the customer has requested, or emphasize a significant reason why the customer should choose you over a competitor? If not, your graphic can be improved.

Content: Without the title or action caption can the audience easily comprehend the message? Is all the content within the graphic pertinent to the title or action caption? If your answer is no to either of these questions, your graphic could be misleading or it could be overlooked. Figure 4.2-1 presents the action caption (at the top) and compares two alternatives. The graphic on the left fails to align with the action caption, while the one on the right is more successful.

Aesthetics: Does every aesthetic decision have a purpose? What message does the style of the graphic communicate? Is it consistent with the rest of the graphics in the response? If the answers to any of these questions is no, then your graphic will lower your chances of success.

Summary: Lower cost 30%, increase speed 43%, and get greater 99.99% uptime with our three-step approach.

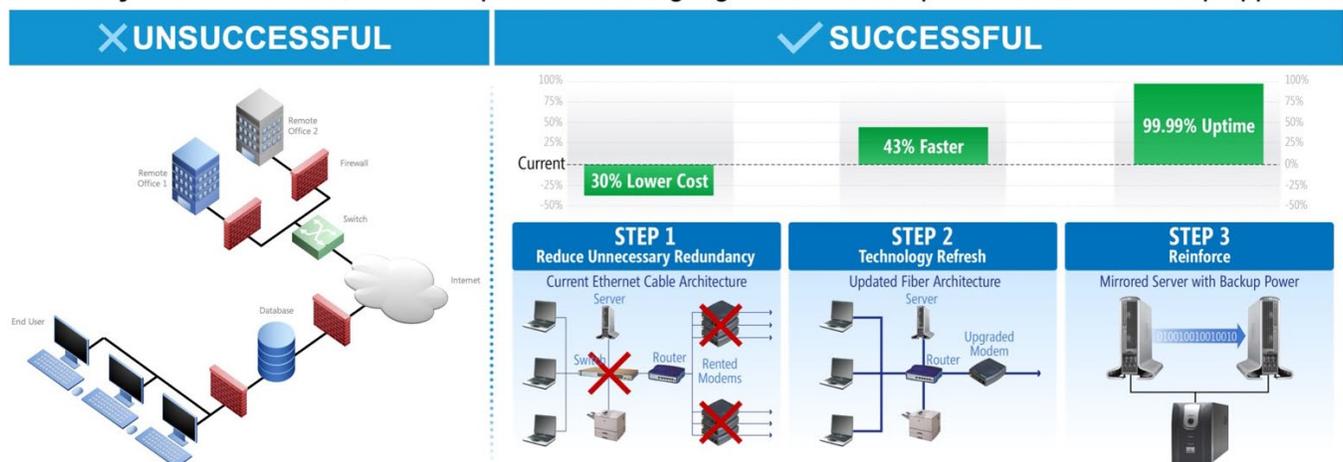


Figure 4.2-1. Aligned Summary. Graphic content must be clear even in the absence of a summary (action caption). The graphic on the right shows the summary more clearly than the one on the left.

Seek feedback from outside the proposal team. If someone unfamiliar with your solution can understand your graphic, it’s a strong indication that the graphic can be understood by a broad audience.

5.0 Types of proposal graphics

There are two broad categories of proposal graphics:

- 1) Traditional proposal graphics, which are the graphics commonly used in documents
- 2) Multimedia focused graphics such as animations, web deliverables and videos

In general, traditional graphics are used in both federal and commercial proposals. Multimedia graphics are used more often in the commercial space, where there are fewer RFP-driven requirements.

Traditional proposal graphics fall within several categories. Below are some of the more common groupings of graphics and best practices to consider when using them:

Quantitative graphics: These data-driven visuals help your audience review metrics-based information easily. Common examples include pie charts, line graphs, and bar charts. It is best to emphasize the conclusion or trend you want the reader to make based on the data.

Process flows and timelines: This style of visual shows steps over time, interdependencies, and parallel activities. To avoid cluttered graphics, simplify the information and use grouping, hierarchy, and alignment to make it easy to follow. Be sure that the process flows in the direction your audience reads. For example, if your reviewers read from left to right, you want your depiction of the process to flow in the same direction. Make it intuitive to evaluate.

Comparison charts: This style of graphic contrasts two or more elements of information such as a before (current) state and after (desired) state. Examples include bridge and scale graphics. Designers often emphasize the differences between the states and make the desired state more aesthetically appealing.

Hierarchical graphics: These graphics show a ranked flow or order of an organization or product line. Pyramid and stair graphics can clearly show hierarchy.

Schematics: This type of diagram is used to illustrate parts of a system.

Maps: Most typically, these are geographic in nature. They are used to show locations or depict steps through space and time.

See Figure 5-1 for some types of graphics that can be used in each of the categories listed above.

EXAMPLES OF DIFFERENT GRAPHIC TYPES

Quantitative Graphics	Bar Chart	Bubble Chart	Pie Chart	Line Chart	Spiral	Radar	Point Chart	Table
Process Flows and Timelines	Timeline	Step-by-step	Conveyer Belt	Waterfall	Road Graphic	Pyramid	Bridge	Looping Graphic
Comparison Charts	Before and After	Building Block	Gauge Graphic	Table	Dashboard	Venn	Scale	Pie Chart
Hierarchical Graphics	Pyramid	Stair	Org Chart	Waterfall	Tree Diagram	Stack	Hexagon	Hub And Spoke
Schematics and Maps	Photograph	Cross-section	Map	Floorplan	Exploded Diagram	Cutaway	Collage	Illustration

Figure 5-1. Sample Graphic Types. The table shows some of the graphic types used in proposals.

Common multimedia graphics include:

Web-based deliverables: Web-based deliverables include documents, videos, or other supporting materials delivered over a virtual platform. Examples include microsites, spark pages, and Adobe experience manager sites. Key considerations are data security and how the deliverable will be accessed.

Videos: Videos can bring motion into designs, elevating your proposals. Considerations with video include: 1) production time and logistics, 2) file size, and 3) video hosting. Due to the large file size of videos, including them can slow the performance of the files in which they are embedded. To overcome this challenge, many designers use third-party hosting platforms. However, this raises concerns about data security and accessibility, especially in terms of a reader's willingness to click on a web link.

Interactivity (animations and non-linear navigation): Adding animations (like GIFs and movement in PowerPoint) and interactivity (such as navigation bars), is predominantly seen in presentation files. When using any form of interactivity, think about how the client will access the information. Unless animations are presented during a live meeting, you will likely need to share a type of presentation file with the client. This can create problems if the customer is not familiar with their use (such as a PowerPoint Show .ppsx file). Navigation should include clear actions for the reader to follow, so be sure to label and highlight all hyperlinks, fields, and buttons clearly. A best practice for non-linear navigation is to use hyperlinks wherever possible to ensure compatibility across all systems and to eliminate the need for special software or plugins to use your files.

6.0 Design principles and techniques

To be seen as professional, all graphic types and use cases should follow basic design principles. Design choices should guide readers through your graphics, improve comprehension,

and build trust. Avoid design choices that are inconsistent with your audience, message, or subject matter.

There are many design principles and techniques, but the six most commonly used by proposal graphic renderers are:

Color: Color and contrast (which can also be perceived as color) are often the first elements that people notice. Color has subject and culturally specific meaning and can influence mood. Hence, every color choice should be intentional and serve a purpose. For example, if your aim is to establish your company's brand, use your company's colors. If your objective is to cultivate trust, consider using your customer's colors. Settle on a color palette before rendering graphics, and avoid deviations. A shift in color can lead readers to infer a change in meaning. If the meaning is unclear, reviewers may become confused.

Style: The style of your graphics plays a significant role in understanding and conveys substantial information about your company and solution. Figure 6-1 illustrates the same subject matter designed in two contrasting styles. Style A leans toward photorealism, while Style B adopts a more simplified aesthetic. The style of your graphics also conveys your company's culture and approach to customer service, problem-solving, and other responsibilities. For instance, well designed graphics communicates that your company is professional and capable. Conversely, aesthetically unappealing or unprofessional graphics can suggest that you, your solution, and your company may lack professionalism and be the inferior choice.

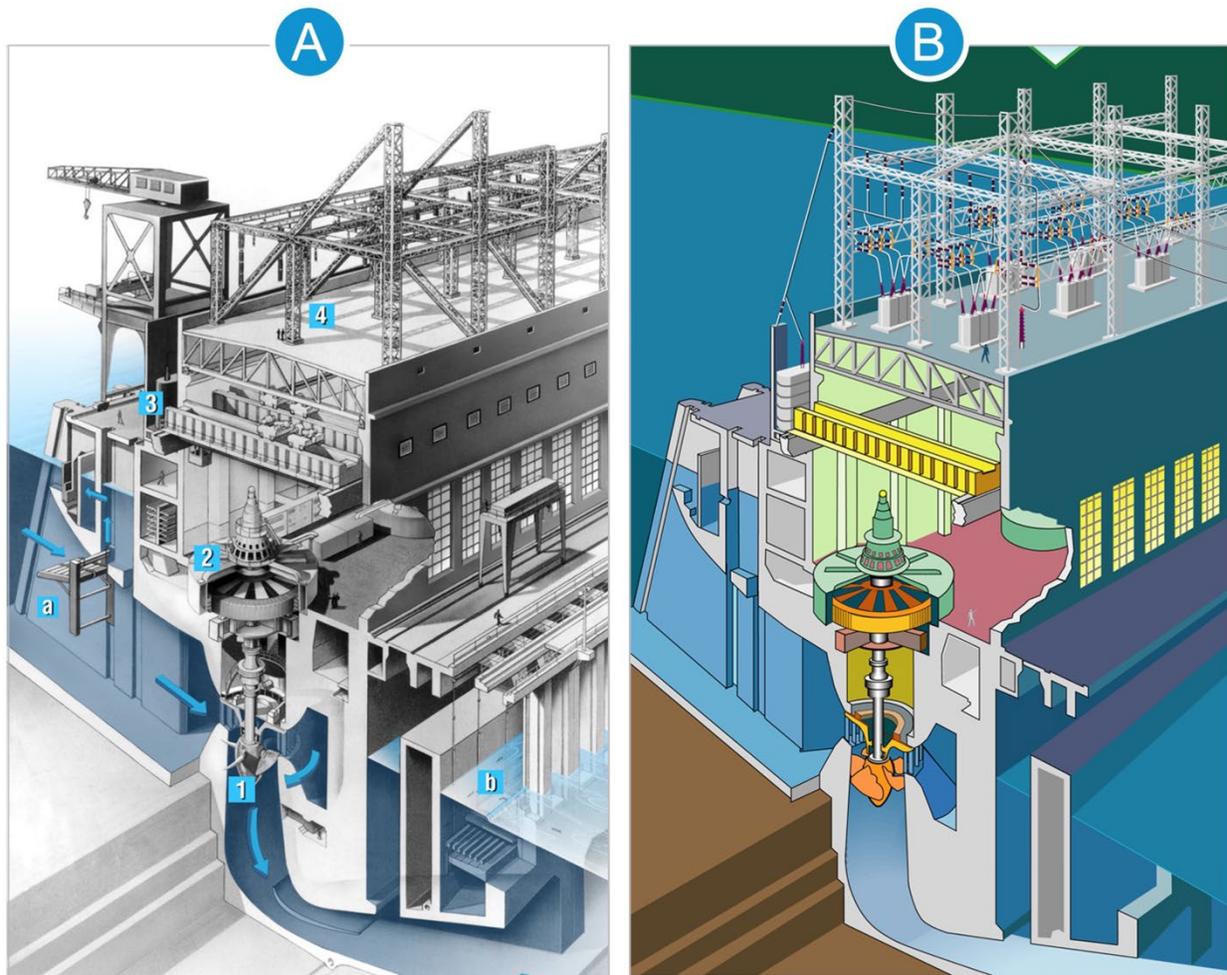


Figure 6-1. Understanding Graphic Style. Aesthetic style affects perception and understanding. (Bonneville Generator graphic developed by U.S. Army Corps of Engineers) (*images.usace.army.mil*)

Consistency: Aesthetic consistency (achieved through color, style, lines, and fonts) conveys that your team is in sync. Since consistency requires extra planning and effort, it showcases the dedication you put into crafting the proposed solution and reflects your company’s commitment and professionalism. Creating and using templates aid in maintaining this consistency. (For more on this, see the section on templates within the best practice section.)

Grid: Most successful graphics use an invisible grid. Use a grid to ensure your graphic elements are evenly spaced, orderly, and straightforward. Figure 6-2 illustrates the difference between a graphic that uses a grid and one that does not. (For more information on how to use grids, refer to *Basics Design 07: Grids, Second Edition* by Gavin Ambrose and Paul Harris.)

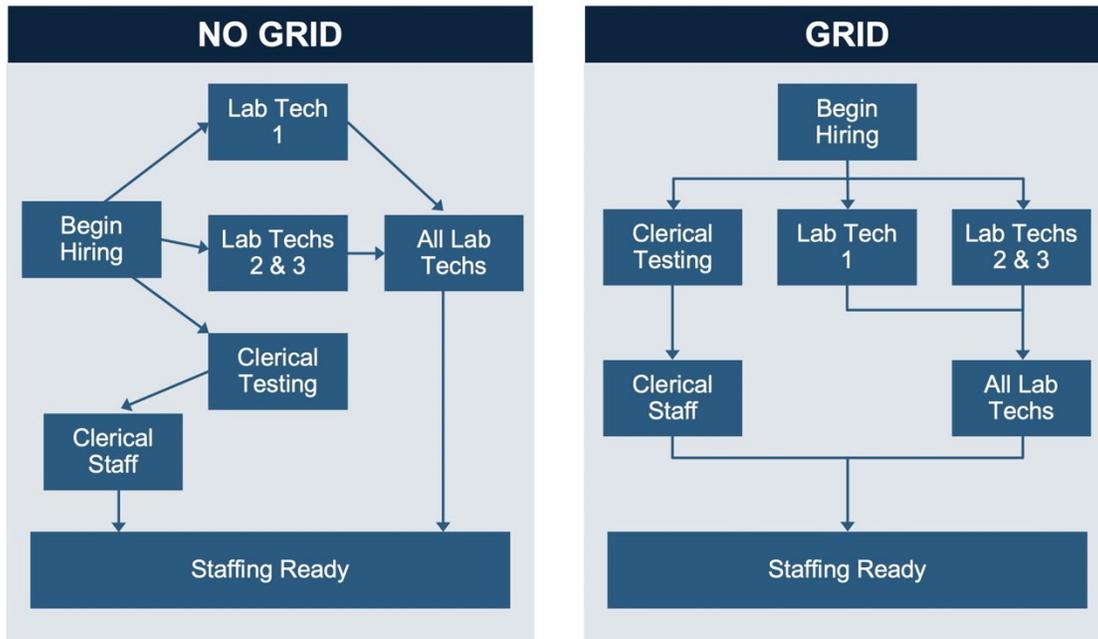


Figure 6-2. Designing Graphics Using a Grid.

Using a grid improves comprehension and understanding by adding visual order.

Balance: Balanced graphics project a sense of stability and harmony, while unbalanced ones can evoke feelings of unease. Graphics achieve aesthetic balance when their left and right sides, and to a lesser degree, top and bottom, appear to “weigh” similar amounts, fostering a sense of equilibrium. Figure 6-3 exemplifies visual balance.

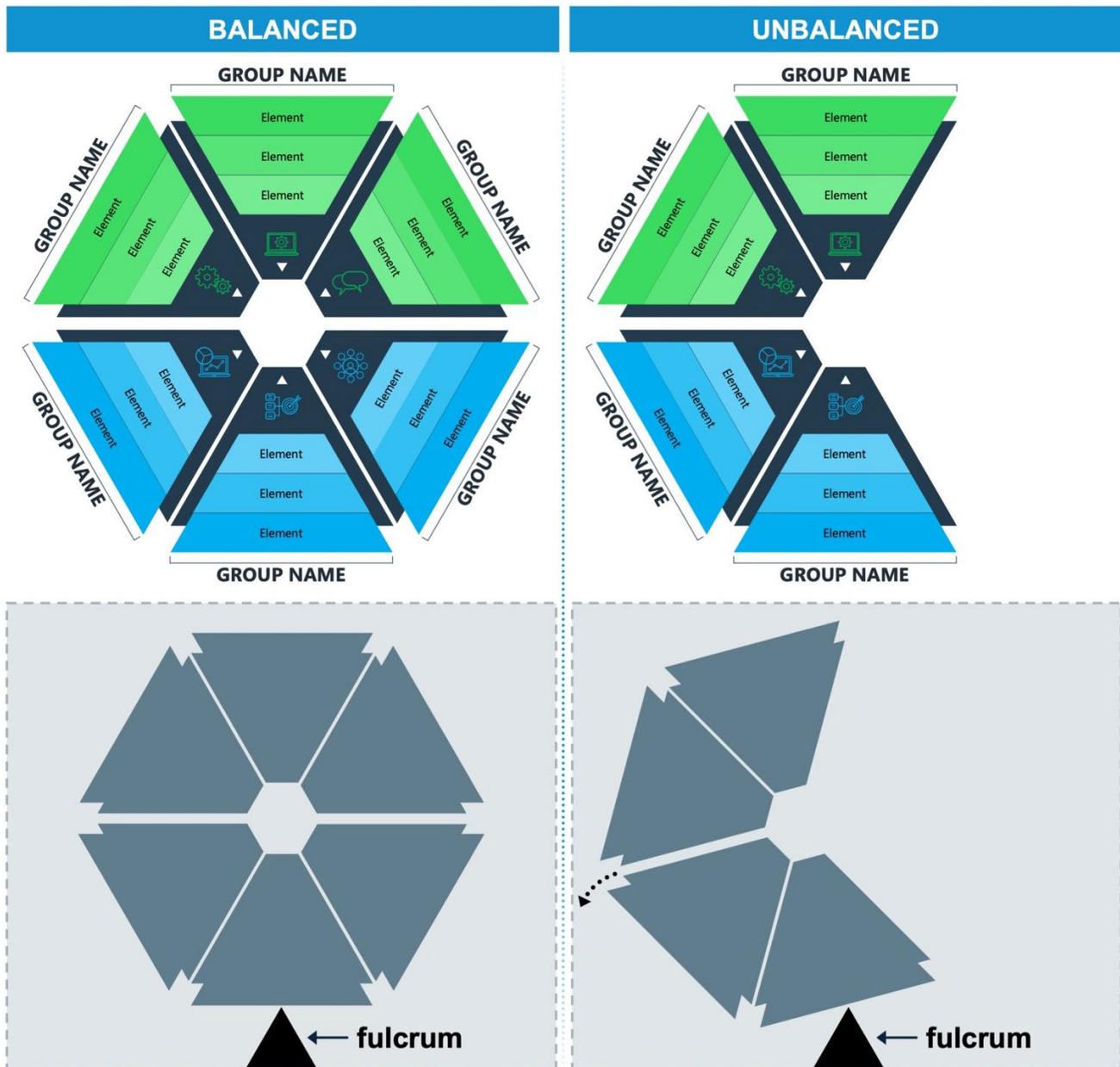


Figure 6-3. Designing Balanced Graphics. *Visual balance impacts mood and perception; balanced graphics can connote stability while imbalanced graphics show instability.*

Shapes: Shapes and lines influence a reviewer’s perception and understanding. Diagonal shapes and lines are more dynamic and energetic. However, excessive use may elicit feelings of unease or agitation. Too many diagonal lines can even lead to a graphic appearing disorganized and untidy, typically making it challenging to follow. Horizontal and vertical shapes and lines convey a sense of stability, suggesting that the presented information is organized and controlled. Curved shapes and lines (such as circles and ovals) are soothing and calming, often helping to ease your target audience. Consequently, curved, horizontal, and vertical shapes and lines usually generate a positive impression. Figure 6-4 illustrates the impact of

shapes on mood and perception.

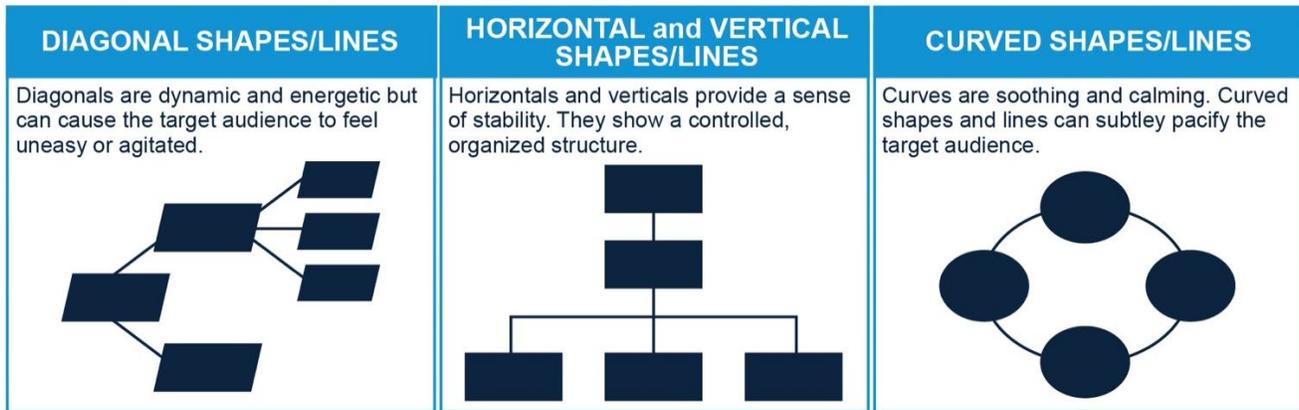


Figure 6-4. Using Shapes in Graphics. Shapes and lines impact mood and perception.

7.0 Industry best practices for creating impactful graphics

7.1 Templates

Templates help ensure consistency and compliance, reduce the need for redesign, and save time in the development process. Templates help give your graphics a unified look and feel, which is expected of a mature organization and solution provider. Be sure the visual vocabulary for repeated elements such as icons, symbols, and other imagery is defined in the template.

Good templates include: a color palette, graphic style, icon and symbol style, arrow style, font (typeface and size), line spacing, capitalization scheme, and the dimensions/resolutions to use when creating graphics.

Your template should consider:

- The size of the graphic
- The medium in which it will be presented (e.g., printed page, projected, digital)
- How the team wants to be perceived by the client (e.g., modern, traditional)
- Branding concerns, such as using your company’s branding or the customer’s
- Special accessibility considerations (e.g., readers who are blind or have low vision, graphics duplicated in black and white for review)

7.2 File formats

There are two primary formats of proposal graphics: vector and raster. Figure 7.2-1 summarizes the differences between the two. When to use these formats depends on style, use, and submission type.

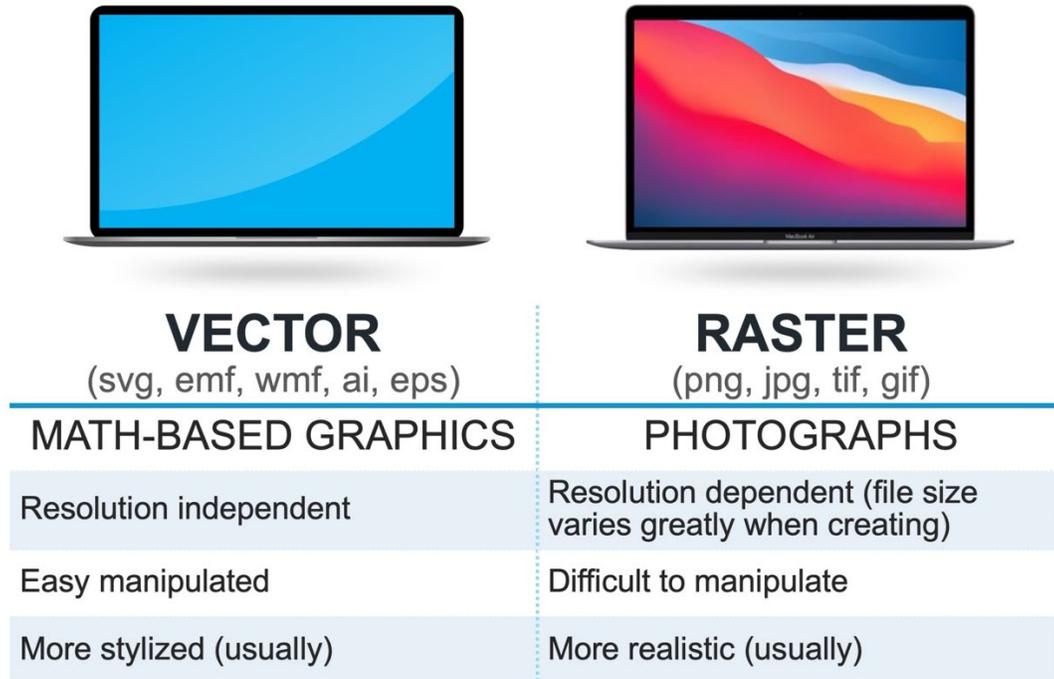


Figure 7.2-1. Vector vs. Raster. *This table compares vector images with raster images.*

Vector graphics (e.g., SVG, EMF, WMF, AI) are resolution independent, meaning all elements can be scaled without sacrificing image quality. File sizes are typically smaller, and graphics remain editable.

Raster graphics are flat, uneditable files (e.g., JPG, PNG, TIF, GIF) made up of pixels. They are usually 150 to 300 dots per inch for print and a lower resolution for on screen use. These files are resolution dependent, which means the final dimensions and presentation medium must be known to ensure image integrity, legibility, and quality.

Some file formats, like JPG and PNG, allow for image compression. This reduces file size by lowering image quality. If possible, heavy compression should be avoided.

To avoid font and file size issues, create graphics at the same dimensions as they will appear in your proposal. For instance, if your proposal graphic will measure 6.5 inches (16.51 centimeters) in your proposal document, ensure that the original, rendered graphic has the same dimensions. To know your font size, do not scale the graphic after it is placed into your proposal. For example, if the graphic is scaled down, font size compliance is at risk.

7.3 Content management

Effective content management of graphic assets is crucial to ensure smooth collaboration, easy access, and efficient workflows. Some best practices to consider are:

Use a centralized content repository to store all proposal-related graphic assets: This could be a shared network drive, cloud storage platform, or dedicated tool. If you're using a folder structure, it should be logical and straightforward for team members to navigate when locating or accessing graphic assets.

Implement a clear file naming convention: Consistent asset naming can maintain clarity, make assets easy to find, and reduce the risk of duplicate files. Use descriptive and significant names that reflect the content, version, and purpose of each asset. Incorporating version numbers or dates can prevent confusion and ensure the latest assets are always available for use. If you work on an international team, establish a preferred date format.

Implement version control to manage changes and revisions to graphics: Consider using version control mechanisms to track updates, edits, and iterations, ensuring an audit trail of any changes. Adopt a file naming and logging system that identifies the proposal, the graphic number, and the version number (e.g., XYZprop_001_v2). Position the log number within the graphic in a discreet location for future identification.

Include relevant metadata and tags to provide additional context to graphic assets: You might consider adding information like the project name, date, keywords, purpose of content (e.g., to raise awareness, to move the customer from the consideration to the decision stage, or to influence decision-making), and descriptions. Metadata and tagging can significantly enhance searchability in a content repository.

Follow clear guidelines for graphics collaboration and approval workflows: Define roles and responsibilities for team members, outlining who has permissions to edit, review, and approve graphic assets. Implement a process for requesting changes, providing feedback, and documenting approvals to maintain a streamlined workflow.

Regularly back up graphic assets: Frequent backups prevent loss in the event of system failures or accidental deletions. Different storage devices or cloud-based solutions can be used for backing up or archiving assets. Implement a process to test the backup and recovery process regularly to ensure its effectiveness.

Develop and maintain documentation or style guides: These resources provide specifications and standards for using graphics in proposals. They should include information on branding, color schemes, typography, image resolution, and file formats, ensuring consistency and uniformity across your organization's proposals.

Invest in training or knowledge-sharing sessions to help team members become proficient in managing and using graphics: Offer resources and tutorials on using design software, organizing assets, and adhering to best practices. Encourage team members to share tips, techniques, and feedback to foster continuous improvement.

To improve your chances of winning, ensure your proposal is easy to review and evaluate by implementing the following best practices:

- Avoid graphics that require the reviewer to rotate the document, such as shifting from portrait to landscape.
- Include an action caption below your graphic.

- Introduce your graphics with a unique identifier (e.g., Figure 1, Exhibit 1, Table 1) in the body of your proposal for easy reference and tracking.
- Position your graphics close to the associated narrative for easier correlation.

7.4 Copyright law

If you do not have permission from the owner of an image, you are not legally allowed to use that image in your proposal. Images are automatically protected under copyright law in nearly every country, valid with or without a copyright notice. According to copyright law, the creator of an image automatically holds the rights to that image upon its creation, and they may choose to grant or withhold the right to reuse it.

Excluding cases where an image is classified as public domain or used in accordance with fair-use laws, permission to use must be obtained from the owner, either for free or for a fee. For instance, it is illegal to use a photograph or graphic found on the internet (i.e., a photograph located during an internet search) if the usage rights have not been explicitly granted to you. Conversely, it is legal to use photographs and graphics purchased from stock image websites or websites that permit the right of reuse for commercial purposes (i.e., for profit).

When purchasing images, be sure to double-check that the images are licensed for commercial use and NOT solely for “Editorial Use.”

7.5 Visual noise and complexity

The purpose of nearly every proposal graphic is to clarify and explain. To efficiently do so, avoid unnecessary graphic embellishments and visual noise (like textured backgrounds). You should also aim to simplify your graphics to focus on a single message (your graphic’s summary). The following graphics show the benefit of avoiding unnecessary visual noise.



Figure 7.5-1. Visual Noise. *The graphic with no background visual noise (left) is easier to read and faster to understand.*

7.6 Accessibility and Inclusion

Accessibility

Proposal graphics should adhere to accessibility standards to ensure inclusivity and provide equal access to information for all individuals, regardless of their abilities. Everyone perceives the world differently. By making proposals accessible, a broader audience can understand your offering.

Figure 7.6-1 contains five variables that influence how we digest and process information. These variables are central areas of focus to achieve higher levels of accessibility.

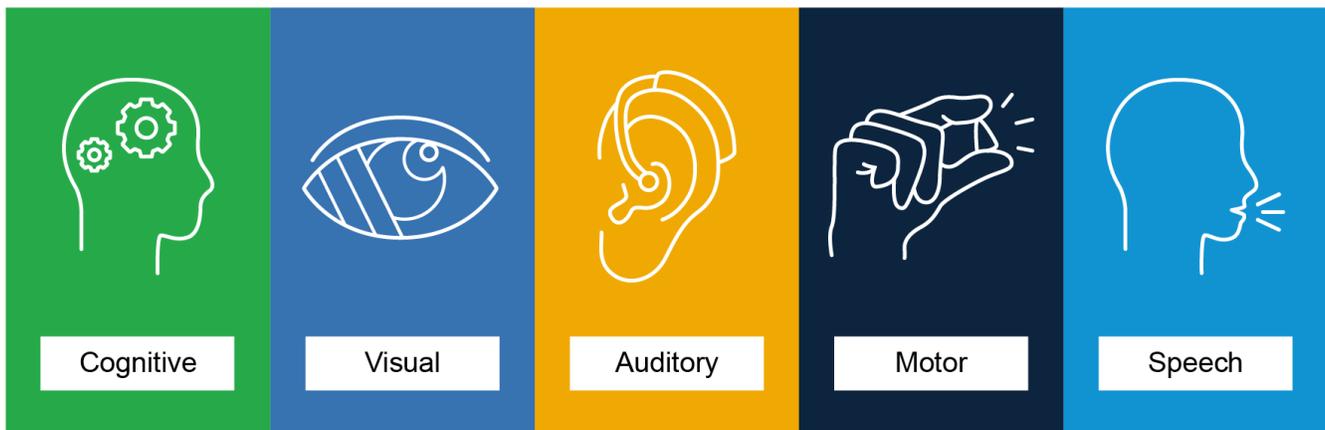


Figure 7.6-1. Information Consumption Variables. *Understanding the five high-level variables that impact how we digest and process information helps you create more accessible proposal content.*

Here are several reasons why proposal graphics should adhere to accessibility standards:

- 1. Inclusive communication:** Accessibility standards foster inclusive communication by ensuring that the information conveyed through proposal graphics can be understood by everyone. They enable people with disabilities, such as visual impairments or cognitive disabilities, to perceive and comprehend the content effectively.
- 2. Compliance with regulations:** Many countries, government agencies, and organizations have legal requirements or guidelines in place to ensure accessibility in various contexts, including digital content. Adhering to accessibility standards for proposal graphics ensures compliance with these regulations, avoiding potential legal issues or barriers to participation.
- 3. Equal opportunity:** Accessible proposal graphics provide equal opportunities for participation. By considering accessibility, you remove barriers that might otherwise prevent individuals with disabilities from fully engaging with your content. It helps level the playing field and ensures that everyone can access and understand the information being presented.
- 4. Enhanced usability:** Accessibility features, such as proper color contrast, clear typography, and alternative text for images, not only benefit people with disabilities but also improve usability for all users. Following accessibility standards results in clearer, more legible graphics that are easier to comprehend and navigate, enhancing the user experience for everyone.
- 5. Positive brand image:** Demonstrating a commitment to accessibility reflects positively on your brand or organization. It shows that you value inclusivity, diversity, and equal access to information, which can enhance your reputation and foster goodwill among a wider audience.
- 6. Future-proofing:** By incorporating accessibility standards into your proposal graphics, you future-proof your content. As technology evolves, accessibility will continue to be an important consideration. By starting with accessible graphics, you can adapt and update your content more easily as new accessibility features and guidelines emerge.

Accessibility is a fundamental aspect of designing and presenting information in a way that considers the needs of all users. By using accessibility standards for proposal graphics, you ensure that your content is inclusive, compliant, and accessible to a broader audience.

The following is an evolving list of accessibility standards worth integrating into your process:

- WCAG (Web Accessibility Content Guidelines): <https://www.w3.org/WAI/standards-guidelines/wcag/>; guidelines for fonts: <https://www.w3.org/TR/WCAG21/#text-spacing>

- Creating accessible content in Adobe: <https://www.gre.ac.uk/creating-inclusive-content/accessible-graphic-design> (includes further links to support accessible design)
- Accessible graphic design handbook: <https://www.rgd.ca/resources/accessibility/access>
- US Government accessibility guidelines: <https://accessibility.digital.gov/visual-design/getting-started/>
- Accessibility Dos and Don'ts (NHS, United Kingdom): <https://accessibility.blog.gov.uk/2016/09/02/dos-and-donts-on-designing-for-accessibility/>
- Adobe InDesign PDF guidance: https://www.doi.gov/sites/doi.gov/files/uploads/may_2019_section_508_compliance_event_-_indesign_accessibility.pdf

Use the following techniques to meet your accessibility and inclusivity goals:

Make sure typography on graphics is clearly legible: Use legible fonts with the appropriate contrast ratios. Avoid placing text in rotated, slanted, or vertical positions where possible. Leverage resources for digital content accessibility (such as [W3 resources](#)).

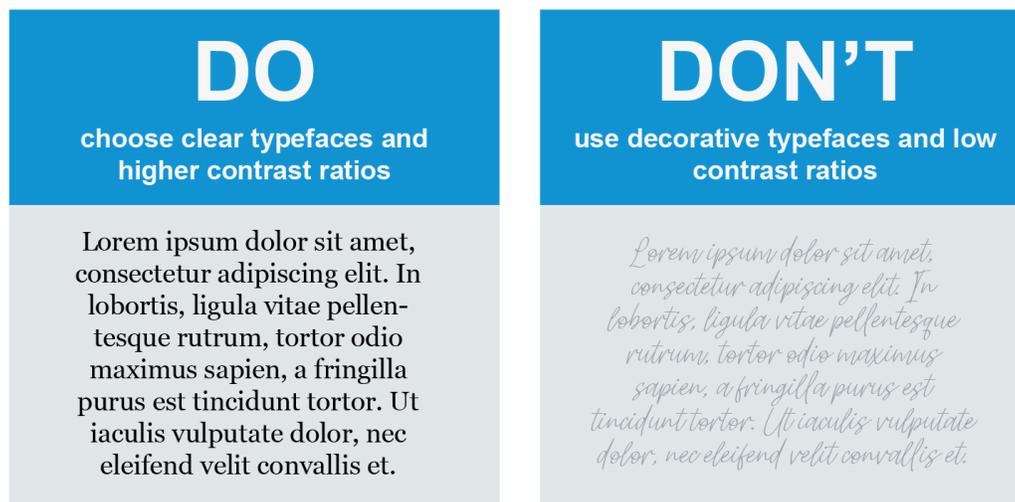


Figure 7.6-2. Legibility. This example shows the benefits of making your graphic text more accessible; the text copy on the left is much easier to read because of font choice and the contrast ratio.

Don't rely on color alone: In addition to color, use labels or icons to differentiate content. Use color blindness checkers to avoid ambiguity between colors.

Apply alternative text (alt text) to images: Alt text differs from captions. Captions provide the proposal message, whereas alt text can include detailed descriptions (especially for complex graphics) for readers who may not be able to visually comprehend or see the graphic. It is usually hidden from view, but screen readers will share the alt text when engaged.

ALT TEXT

Graph of spectral blackbody emissive power in Watts per meter squared micrometers versus wavelength in micrometers. The visible spectral region is indicated as vertical, colored bands. Solar radiation curves are drawn for various ambient temperatures between 50 Kelvin and 5777 Kelvin. Labels indicate the sun's temperature at 5777 Kelvin and the Earth and Spacecraft at approximately 300 Melvin.

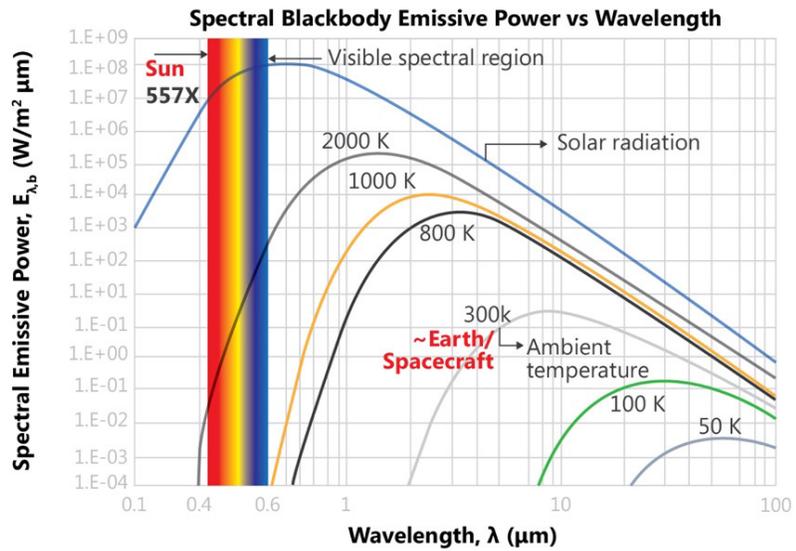


Figure 7.6-3. Alt Text. When applicable, include alt text that clearly explains your graphic. *Example concept courtesy of Johns Hopkins Writing School of Engineering.*

Consider how assistive technologies like screen readers interpret graphics: Ensure content and text within graphics is logically structured, especially when multiple graphics are used in one space. Test the content with assistive technologies, such as Immersive Reader in Microsoft Word. Some tools, like Microsoft PowerPoint, include accessibility features like Reading Order Pane, where content elements can be ordered for screen readers.

Export graphics to accessible formats like accessible PDFs: Accessible formats make it easier for assistive technologies to support users with accessibility needs. Prioritize semantic text and character usage to make it easy for assistive technologies to decipher and express the graphics.

Ensure videos and animations are well captioned and contextualized: Providing closed captions and ensuring visual imagery is contextualized assists people who have hearing impairments or disabilities or cognitive conditions that affect how they intake aural or visual information.

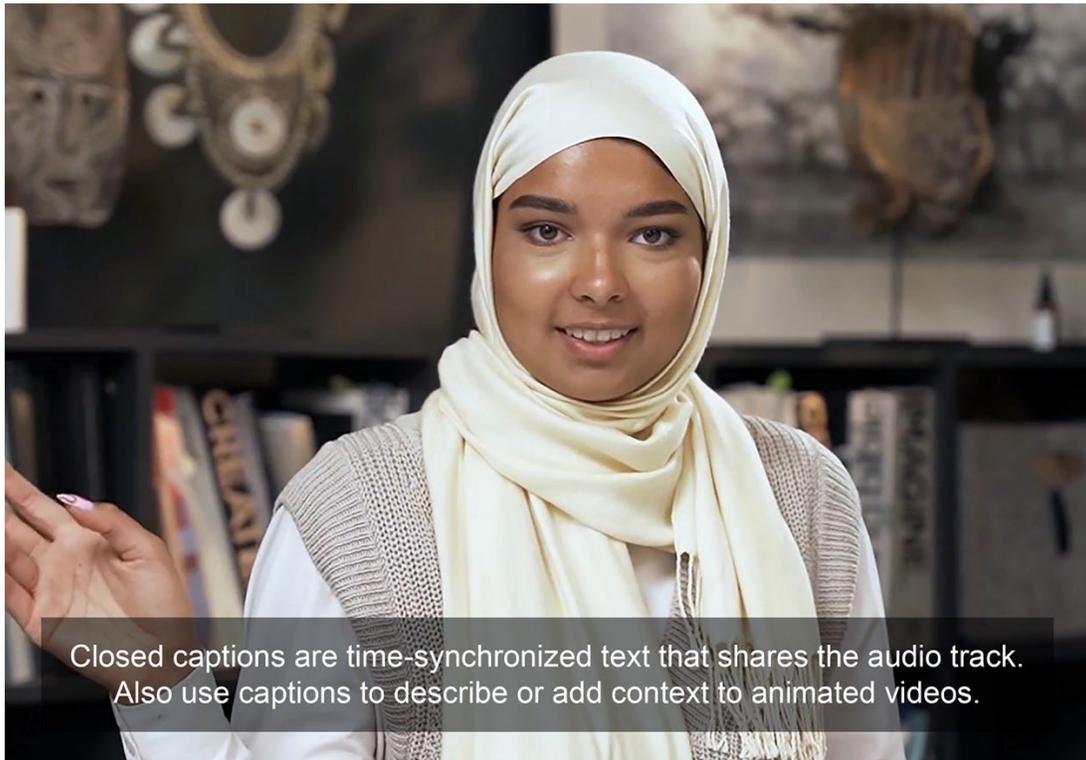


Figure 7.6-4. Captioning. *Include closed captions in your animation or videos to provide information in an alternative format.*

Ease cognitive load in graphic-heavy documents or pages: Easing cognitive load involves grouping content to optimize legibility and clarify understanding. Break up the content into clear sections with meaningful headings/captions. Design with hierarchy in mind, allowing readers to navigate the content more easily. Use anchors within graphics to enable users to explore specific elements further. Grids help you align and distribute content for an easier-to-understand graphic.

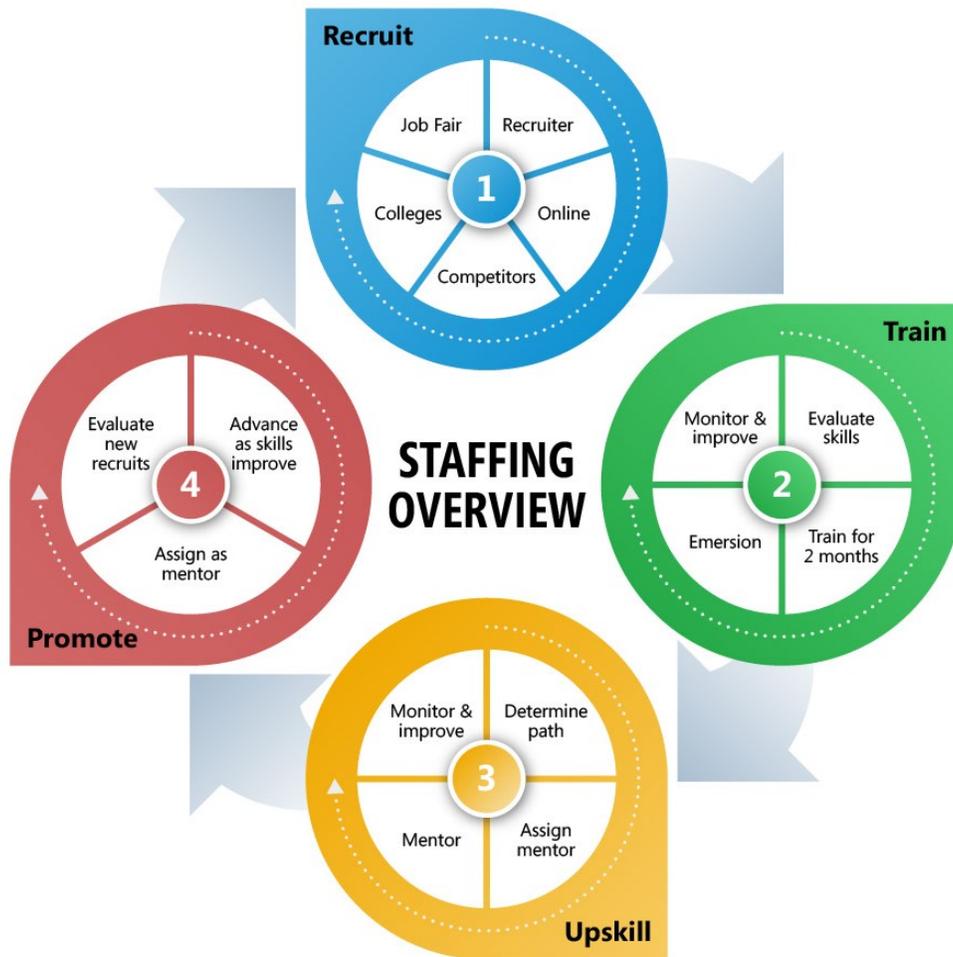


Figure 7.6-5. Using Groups and Hierarchy. This graphic uses groupings and shows that each grouping is of similar value by using visual cues like color and shape.

Ensure consistency in graphic design to reduce confusion, distractions, and sensory overload. Minimize the use of legends and cross-referencing to help ease cognitive

load. Avoid using acronyms or complex text within graphics.

SYMBOL	NAME	FUNCTION
	Start/end	An oval represents a start or end point.
	Arrows	A line is a connector that shows relationships between the representative shapes.
	Input/Output	A parallelogram represents input or output.
	Process	A rectangle represents a process.
	Decision	A diamond indicates a decision.

- **Use familiar icons and symbols that add context or value:** Ensure icons add value or aid understanding and aren't included just for aesthetic purposes. Use a known visual vocabulary to avoid confusion.

Figure 7.6-6. Process Diagram Symbols. These symbols may or may not be intuitive for your audience. Use easy-to-understand icons and symbols to enhance communication.

Leverage effective data visualization: Allow the data and communication goals to dictate the format and visual style rather than following aesthetic trends. Support visuals with brief descriptions of the overall insights gathered by the charts to provide context. Clearly label data and variables. Where possible, complement graphs with tables of information for screen reader users.

Remember that accessibility considerations should be included in the conceptualization and design stages. Making your proposal graphics accessible and inclusive broadens stakeholder engagement, enhances credibility, aligns with modern compliance requirements and organizational priorities, and increases the likelihood of winning.

Inclusivity and cultural sensitivity

When creating proposal graphics, it is important to embrace inclusivity from a cultural perspective. Inclusivity goes beyond diversity in representation; it involves acknowledging and respecting the cultural backgrounds, traditions, and beliefs of all individuals involved.

By incorporating cultural inclusivity into proposal graphics, organizations demonstrate their commitment to equality and social value, foster a sense of belonging, and enhance their reputations. This practice promotes fairness and encourages innovation and creativity by incorporating diverse perspectives. As such, it is important to research your customer and align graphics with their culture and preferences. Tips include:

Representation: Evaluators, reviewers, and decision-makers want to see themselves in received proposals. For this reason, reflect the prospect or customer’s culture to avoid miscommunication or a worse offense. Ensure that proposal graphics feature diverse individuals from various cultural backgrounds. Include people of different races, ethnicities, genders, ages, and abilities to reflect the diversity of your audience and stakeholders.

Cultural symbols and imagery: Incorporate culturally significant symbols, icons, or imagery that is relevant to the target audience. For example, if you are proposing a project in a specific region, include landmarks, traditional attire, or local art to create a connection and align with the cultural context.

Language considerations: If your proposal graphics include text, you could accommodate multiple languages or provide translations to cater to a diverse audience. Avoid relying solely on English and consider incorporating translations or captions in other languages as needed. Where only English text is used, ensure language is simple and easy to understand.

Colors and design elements: Be mindful of cultural meanings associated with colors and design elements. For example, red may symbolize luck and prosperity in some cultures, while it can signify danger in others. Research cultural

associations and preferences to ensure the appropriate use of colors and design elements in your proposal graphics.

Research cultural sensitivities: Research cultural sensitivities of the target audience or community you are presenting to. This will help you avoid inadvertently using imagery that may be offensive or disrespectful. Respect cultural taboos, religious beliefs, and traditions to ensure your proposal graphics are culturally sensitive. You may need to make politically aware design decisions, for example, showing the right military uniform for a government agency.

Collaborate with diverse perspectives: Involve individuals from diverse cultural backgrounds in the creation and review process of your proposal graphics. Seek feedback and input from different stakeholders to ensure that the graphics are inclusive, respectful, and representative of various perspectives.

By implementing these examples and considering cultural inclusivity in your proposal graphics, you can create visuals that are sensitive, relatable, and appealing to a broad range of audiences while building trust with your audience.

8.0 Tools and emerging technologies

There are many factors to weigh when choosing tools to develop winning proposal graphics. Consider the following to help you invest in the right solution the first time.

8.1.1 Tools for conceptualizing graphics

There are numerous options to take into account when conceptualizing a graphic. Consider the following factors before choosing:

- **Conceptualization:** The following factors will help you assess which tools work well for your team:
 - **Preference and accessibility:** Be mindful about which tools are preferred or accessible to other contributors and compatible with their locations, devices, and skill levels.
 - **Flexibility:** Consider if the tool is flexible enough to accommodate quick modifications and easy sharing.
 - **Collaboration features:** Do you require collaboration features, such as comments, version control, and real-time editing?
 - **Visualization:** Consider if you need a tool that facilitates quick sketching, ideation, and concept exploration. Can team members easily visualize their ideas within the tool to foster effective collaboration?
- **Approvals:** Take into account whether you require features that enable exporting or sharing high-quality visuals or mock-ups for presentations to stakeholders and decision-makers to ensure clear and effective communication of your design ideas.

- **Documentation and archival:** Digital tools often provide built-in capabilities for saving revisions and organizing design files, facilitating easy access and reference in the future. This helps maintain a clear record of the design evolution and allows the team to revisit previous concepts if needed.

8.1.2 Tools for rendering graphics

While the rendering tools you use are based on your graphics requirements, think about the following before deciding:

- **Does the tool support your compatibility requirements, such as resolution, formats, file types, and software integration?**
Consider whether you are designing for digital, print, or both. Do you require vector or raster graphics? Which export file types are needed? Do you want to include animations, dynamic visual effects, or interactive elements? Are the graphics suitable for the content types you are producing (for example, integrating easily into your proposal or presentation documents)?
- **Does the tool support the desired qualities of the graphics you want to create?**
Does your graphic need to be editable? Does the tool support the creation of the aesthetic or graphic style you want to achieve? Does the tool support accessibility features you would like to include? Does the output quality of the tool meet your standards of professionalism?
- **Does the tool let you make efficient use of time?**
You might be rendering complex graphics or large batches of graphics, depending on your needs. Does the tool allow you to efficiently create, edit, and export your graphics so you can meet project timelines or iterate your visuals if needed?
- **As with conceptualization, you may require collaboration features to enable input, feedback, or edits from multiple contributors**
Can you easily share rendered graphics with team members or stakeholders? Do you require real-time collaboration to ensure everyone is aligned on the final rendered graphics?
- **If you plan to edit the graphic for future use, consider the following questions:**
 - Is the tool available to any others who need to make edits?
 - Would other contributors have the skills needed to use the tool, or would they require training or guidance before making edits?
 - Are you using a tool that allows you to easily transfer your design assets and models for rendering, ensuring a smooth transition between conceptualization and rendering stages?

While choosing the most suitable tools for conceptualizing and rendering graphics is based on many factors, there are some common tools that are frequently used in bid and proposal environments.

It’s also important to note, based on your budgetary requirements, that some of these tools require commercial licenses to use, while others offer free platforms. Some tools may even be free to use but offer premium features that must be paid for.

Data security is also a factor in determining which tools to use within your organization and has been considered in the selection of the following tool examples.

The following suggestions are based on their wide usage within the industry and are not endorsed by APMP.

<p>Adobe Creative Cloud/Adobe Suite</p>	<p>Adobe provides a wide range of design-focused applications, such as Photoshop, Illustrator, InDesign, Acrobat, Premiere, After Effects, Animate, and more. These tools require licenses for users to access them, although Adobe also offers bundled licenses for access to multiple tools within the Adobe Creative Cloud platform.</p> <p>Adobe’s suite of tools are often the first choice for many graphic designers due to the high level of control over design features and wide application of use. The use of InDesign, Illustrator, and Photoshop are particularly prevalent in the bid and proposal industry. However, Adobe tools may not be familiar to the typical bid professional, and they often require users to undergo training to make use of their advanced functions.</p>
<p>Microsoft 365/Microsoft Office</p>	<p>Microsoft offers a suite of tools that many users may be familiar with, such as Word, PowerPoint, Excel, OneNote, Whiteboard, Teams, Visio, and more. While Microsoft offers a free web-based platform to access many of these tools (Microsoft 365 Online), many features are only accessible within the licensed app versions of each tool; for the most flexibility in graphics design and creation, you may want to opt for the licensed versions.</p> <p>Many organizations will opt for Microsoft due to tool familiarity with users, cost-effectiveness for numerous users, and the flexibility of tool usage and application. Although these tools offer many design options and useful features, experienced designers may prefer tools that offer more control over graphic design elements, such as Adobe’s tools.</p>
<p>Google Suite (G Suite)/Google Workspace</p>	<p>Google offers a suite of tools that users can choose for as a low-cost, user-friendly option for graphics development, including Drive, Docs, Sheets, Slides, Jamboard, and more. While these tools are free to use for noncommercial users, Google Workspace offers businesses and enterprises several licensing options with more security options and features based on an organization’s needs.</p> <p>Google’s applications are web-based and are usually seen to provide better support for collaborative environments, as well as being relatively low-cost compared with other platforms. However, while its tools are quite easy to use and require very little training, the design features within its apps are also fairly limited from the perspective of a more advanced graphic designer.</p>

Table 8.1.2-1-1. Commonly Used Tools. *These tools are commonly used in the proposal industry to either conceptualize or render graphics.*

Many of the above suggested platforms can also be augmented with third-party apps, add-ons and tools to expand their functionality. Users should select such tools with caution and make themselves aware of any potential security risks or training requirements before implementing third-party software within their existing IT environment.

8.2 Emerging technologies

The emergence of new technologies, like artificial intelligence (AI) and infographic builders, offers bid professionals more ways to work more efficiently, conceptualize and develop ideas, and create original and professional images.

AI tools such as [Adobe's integrated Firefly AI tool](#) streamlines production. These tools make it easier for proposal designers to quickly create, update, and evolve raster graphics. It's best to use AI tools prudently to avoid problems like copyright infringement or misrepresentation of information.

To mitigate copyright infringement risks when using AI generators, use tools that use verified imagery data sources that have been vetted and approved for commercial usage. For example, Adobe's Firefly tool verifies that it uses imagery from vetted and approved sources within the Adobe Stock community. Developers of AI platforms will often publish information on their website or within the tool's Terms and Conditions about their data sources and user rights of usage; if they do not specify these details, there is a higher risk in using their tools. Comparisons between these two options' safe and unsafe image generation can be found [on Adobe's website](#).

If you use AI generators to render graphics, consider that even the newest platforms may not be accurate in using imagery or symbolism in the context in which you intend. These kinds of tools are typically dependent on text-based prompts from the user and may not recognize the nuances of the language in your prompt, among other variables. This leads to the time-consuming process of adjusting prompts, which won't guarantee the graphic results you want to achieve.

To conceptualize and render proposal graphics efficiently, consider graphic builders that use an editable library of imagery and prebuilt graphics. You can build your own by developing a library of meta-tagged elements and graphics, or invest in a commercial tool to streamline conceptualization and rendering.

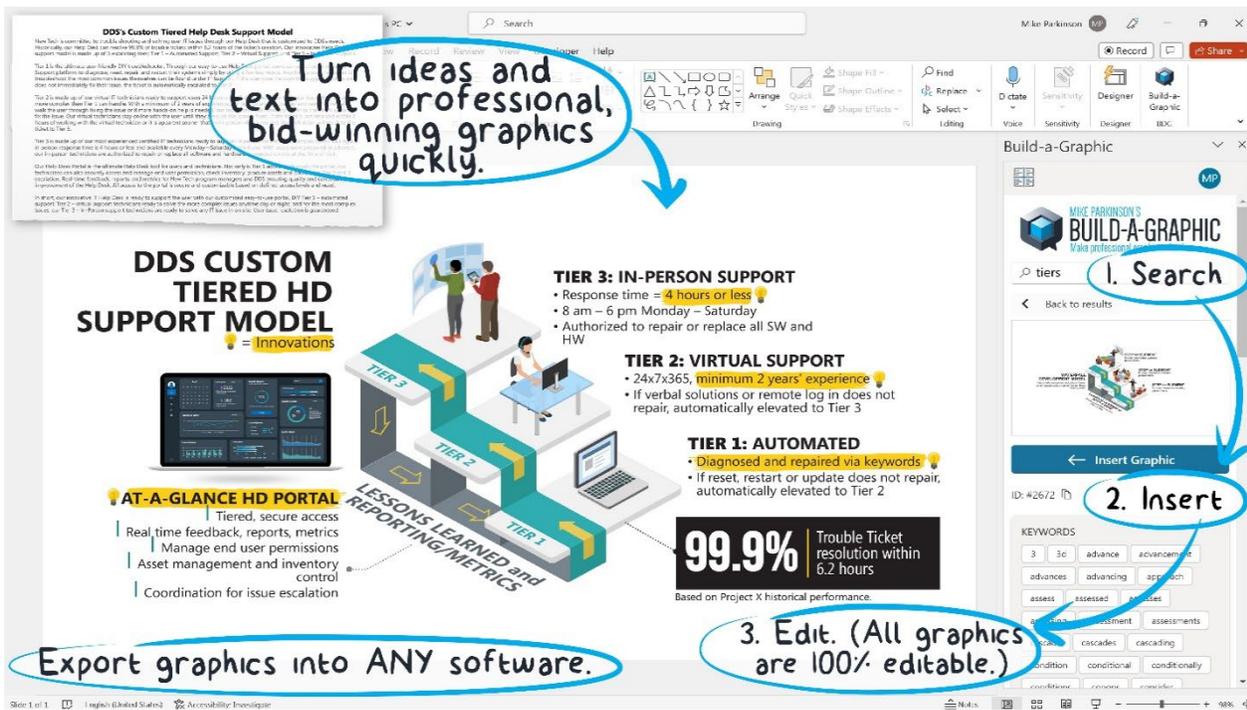


Figure 8.2-1. Using a Graphics Builder

Using add-ins for graphic design can extend the functionality and efficiency of your existing tools.

If you embrace emerging technologies, you can use a combination of AI, a graphics builder, and a library of your own assets to conceptualize and render graphics where each tool is most applicable.

9.0 When and where to flex design principles

Strive to always adhere to design best practices, but know when to deviate. The two biggest drivers in flexing design principles are **aesthetic (look and feel) requirements** and **technical requirements**, which are often dictated within the RFP. Aesthetic requirements may include factors such as branding and style, font choice, and customer preference. Technical requirements pertain to elements like graphic dimensions, page or slide limitations, animations, file size, delivery methods, and the tools used to create or exhibit graphics.

As a specific example, you can overlook the “rule of thirds” design principle (i.e., dividing designs into thirds is more visually appealing) in favor of improving understanding, being comprehensive, and meeting compliance.

Another example might be to deviate from your corporate brand standards in support of RFP requirements and reflecting the customer’s brand to help build trust.

Some other considerations to meet aesthetic and technical requirements include the following:

- **Image scaling and maintaining proportions**

Be cautious when resizing images because it can result in noncompliance, loss of

image quality, and distortion (vector graphics are resolution independent and will not lose quality when scaled up or down). When possible, lock the aspect ratio of your graphic to avoid distortion.

- **Image density**

It's important to strike a balance between fitting images within the available space and preserving their visual integrity (including ensuring text within images is still clear and legible). Edit text or break visuals into multiple graphics to avoid overcrowding with too much content. Including balanced white space (the area of the graphic with no content) improves legibility and professionalism.

- **Nonstandard text**

You may need to use vertical text or rotate the placement of text to fit content into the allowable dimensions. Ensure that the text remains as legible and easy to read as possible. Experiment with different layouts and positioning to find the optimal balance between text and visuals.

Balancing clarity and compliance requires adaptable design. While flexibility is permissible, a good designer exercises judgment and maintains visual cohesiveness within the constraints of the requirements. Strive to meet the specific needs of the proposal while adhering to as many design principles as possible to ensure professional and impactful graphics use.

Common pitfalls and misconceptions

Not writing the summary (e.g., action caption) first: Failing to know what you want to say before you say it almost always results in wasted effort and frustration. Always write the summary of your graphic first.

Using more detail than needed: A visual becomes too complicated when the author attempts to convey too many messages in one graphic, includes detail not relevant to the summary, or fails to effectively edit the included content. Focus on simplicity and clarity to avoid too much detail.

Failing to explain yourself: An unclear graphic can happen when the author erroneously assumes that the customer understands the subject matter on the same level that they do. Know your audience's proficiency level before creating your graphic.

Making aesthetic mistakes: Poorly rendered graphics result from a lack of design skill. These graphics are homogeneous at best and unprofessional at worst. All aesthetic choices should have an objective reason that aligns with the goal of the graphic and the proposal. To ensure graphics are as professional as possible, work with a trained designer, follow design principles, and always have an objective reason for every design choice.

Failing to differentiate between conceptualization and rendering skill sets: Align the needs of the team with the designer's skills to avoid wasted effort. Not all designers are both. Know the skill needed before starting the task.

No quality control: Graphics riddled with spelling errors, omissions, duplicate content, or inaccessible content reflect poorly on the designer and solution provider. Always run spell-check

and cross-check your work. Ensure interactive files, including documents including hyperlinks, work as intended. The best-case scenario is to ask someone else to check your work.

Summary

- Write the customer-focused summary (titles and action captions) before conceptualizing and rendering graphics.
- Create key graphics before writing your proposal.
- Start with a graphic that summarizes your entire proposal (i.e., executive summary) and use it as a road map during proposal development.
- Use an objective, repeatable process and graphic templates to ensure consistency, lower cost, and improve win rates.
- Know when and when not to use graphics.
- Ensure that all aesthetic decisions have a clear purpose that is consistent with the RFP, audience, and message.
- Track graphic development to effectively schedule and staff graphics support for future proposals.
- Understand that the style and professionalism of your graphics reflects your company culture, the professionalism of your company, and the quality of your solution.
- Design graphics to be as accessible and inclusive as possible.
- Graphic compliance is critical. Often, the RFP requirements will state that content within your proposal response must comply with certain content and aesthetic requirements such as font style and size. Follow these requirements to avoid noncompliance and/or avoidable losses.

Other resources

To learn more about proposal graphics, read [Billion Dollar Graphics](#) by Mike Parkinson.

For more information on effectively creating statistical graphics, refer to [The Visual Display of Quantitative Information](#) by Edward R. Tufte.

For more information on how to use type effectively in infographics and graphics in general, refer to [The Non-Designer's Design Book](#), fourth edition, by Robin Williams.

For a high-level view of how neuroscience impacts good proposal design refer to [Impossible to Ignore: Creating Memorable Content to Influence Decisions](#) by Carmen Simon, PhD.